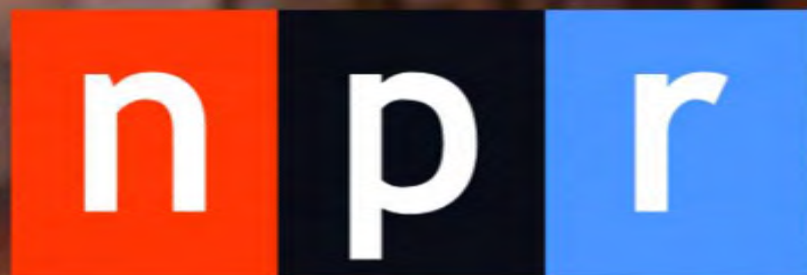


# **EXHIBIT 40**

# The SMART AUDIO Report





# Methodology

**1620 online surveys**

**800 Smart Speaker owners**

**820 Non-owners**

**Adults 18+**

**Data weighted to Smart Speaker owner  
estimates from Infinite Dial 2017**

**15 in-home interviews with Smart Speaker owners**

**Conducted in Atlanta, Chicago, Los Angeles,  
New Jersey, and Allentown, PA**

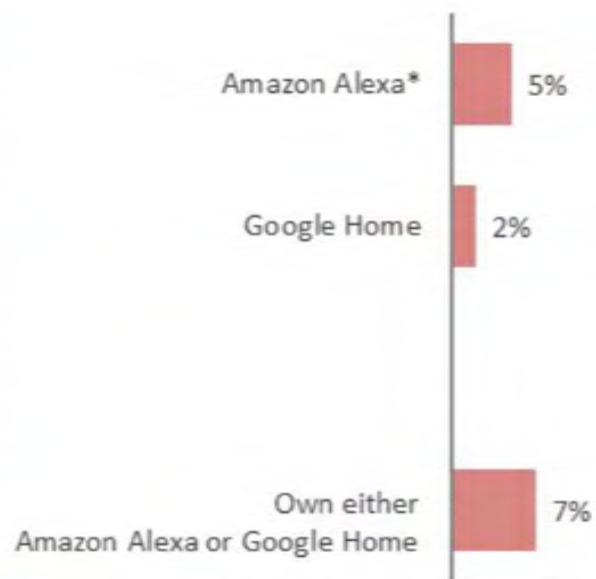






# Smart Speaker Ownership

Total Population 12+



*\*Asked as "Amazon Echo or Amazon Dot, which uses the Alexa voice service"*



% owning smart speaker

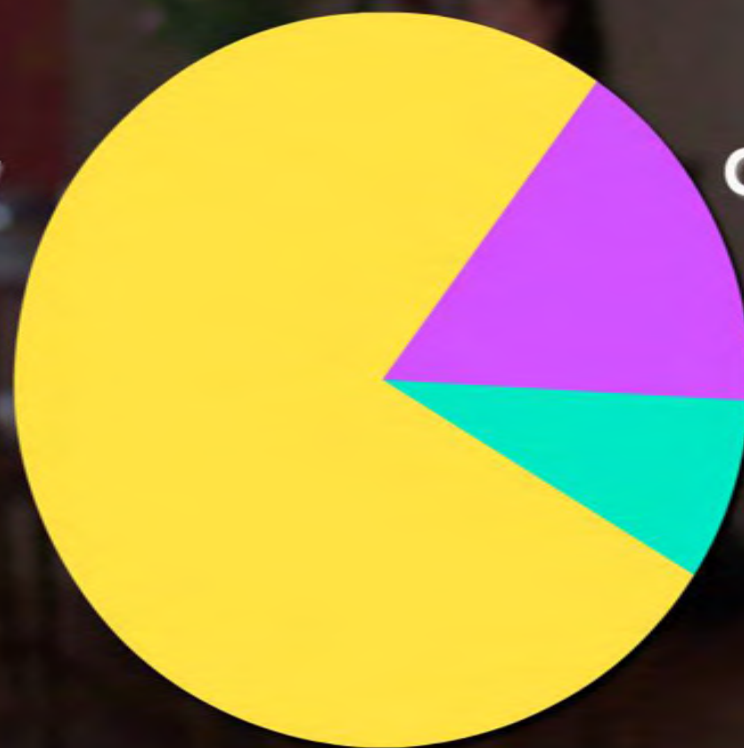


The Infinite Dial © 2017 Edison Research and Triton Digital



# Smart Speaker Owners:

**Alexa only**  
**76%**



**Google Home only**  
**16%**

**Both**  
**8%**



# Subscribe to Amazon Prime:

Smart Speaker  
Owners:

82%

Non-Owners:

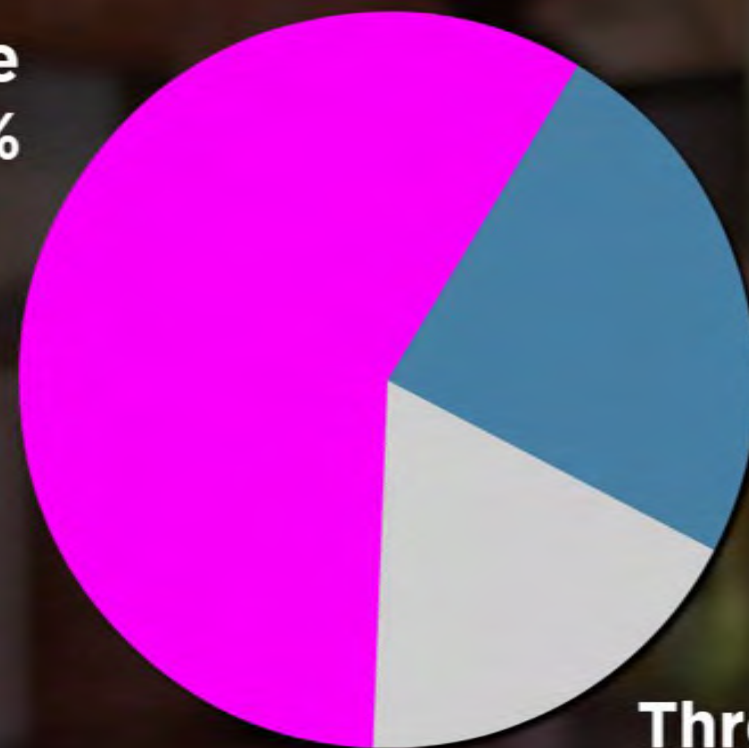
44%





# How many Smart Speakers do you own?

## Smart Speaker Owners



**One**  
**58%**

**Two**  
**24%**

**Three or more**  
**18%**





# 45%

of Smart Speaker Owners

**plan to purchase  
another  
Smart Speaker**





## Where is your primary Smart Speaker located?

### Smart Speaker Owners

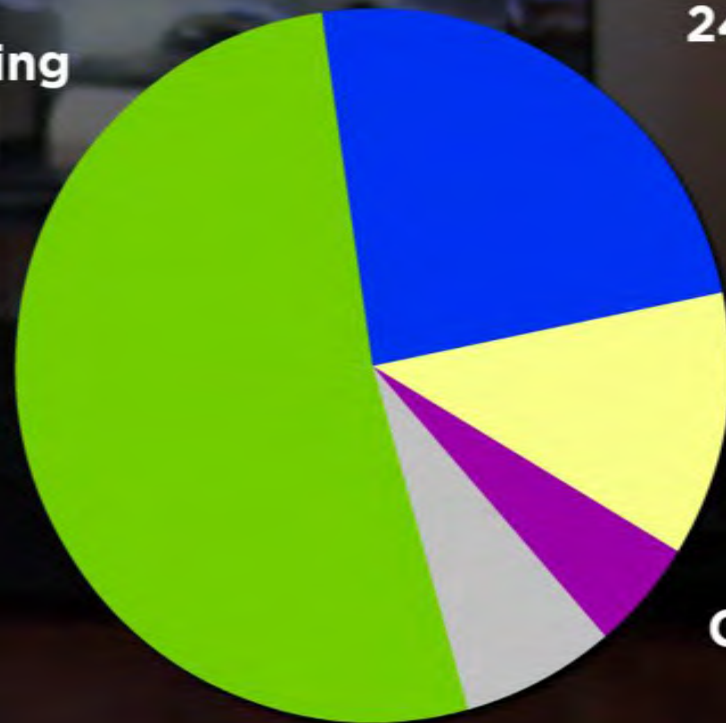
Living space  
(family room/living  
room/den)  
52%

Kitchen  
24%

Master bedroom  
12%

Other bedroom  
5%

Other location  
7%



\*If own more than one respondent was asked about the location of the speaker used most. If own one speaker respondent asked the location of speaker.



## Smart Speaker Owners

Compared to the first month of ownership, are you now using your Smart Speaker...?

More often  
47%

About the  
same  
36%

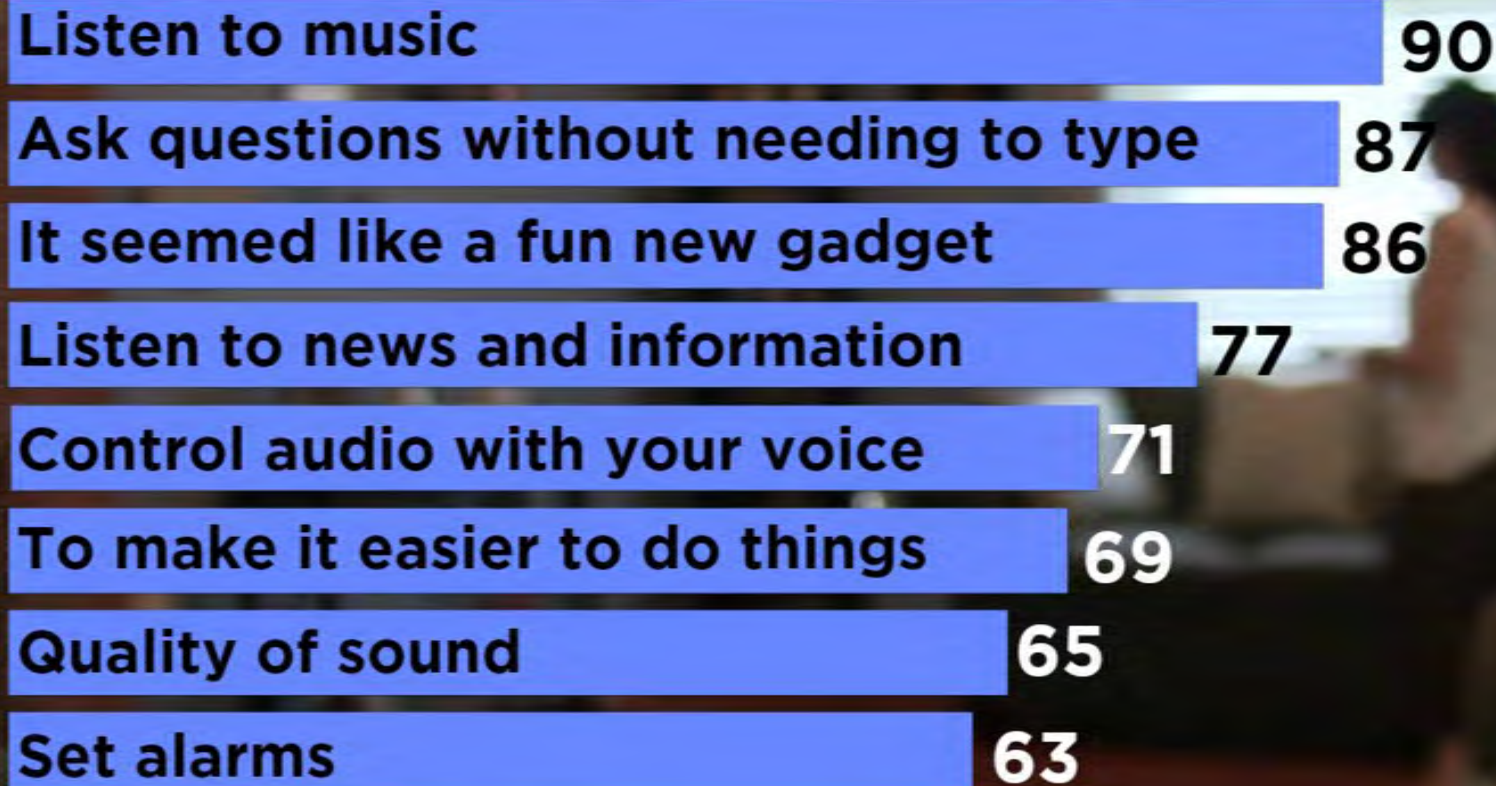
Less often  
17%





## Smart Speaker Owners

### Reasons for wanting a Smart Speaker:



% saying reason

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## Smart Speaker Owners

# Reasons for wanting a Smart Speaker:

Hear better music than on AM/FM radio 62

Discover new songs 53

Control smart home devices 48

Listen to talk radio/sports talk 44

Listen to podcasts 40

Replace an old stereo 39

Entertain children 36

Help Disability 16

Help elderly 12

% saying reason



Page 2/2







**42%**

of Smart Speaker Owners

**say that their Smart  
Speakers are essential  
to their everyday lives**





How much do you agree/disagree...

Smart Speaker Owners

**Strongly Agree/Agree:**

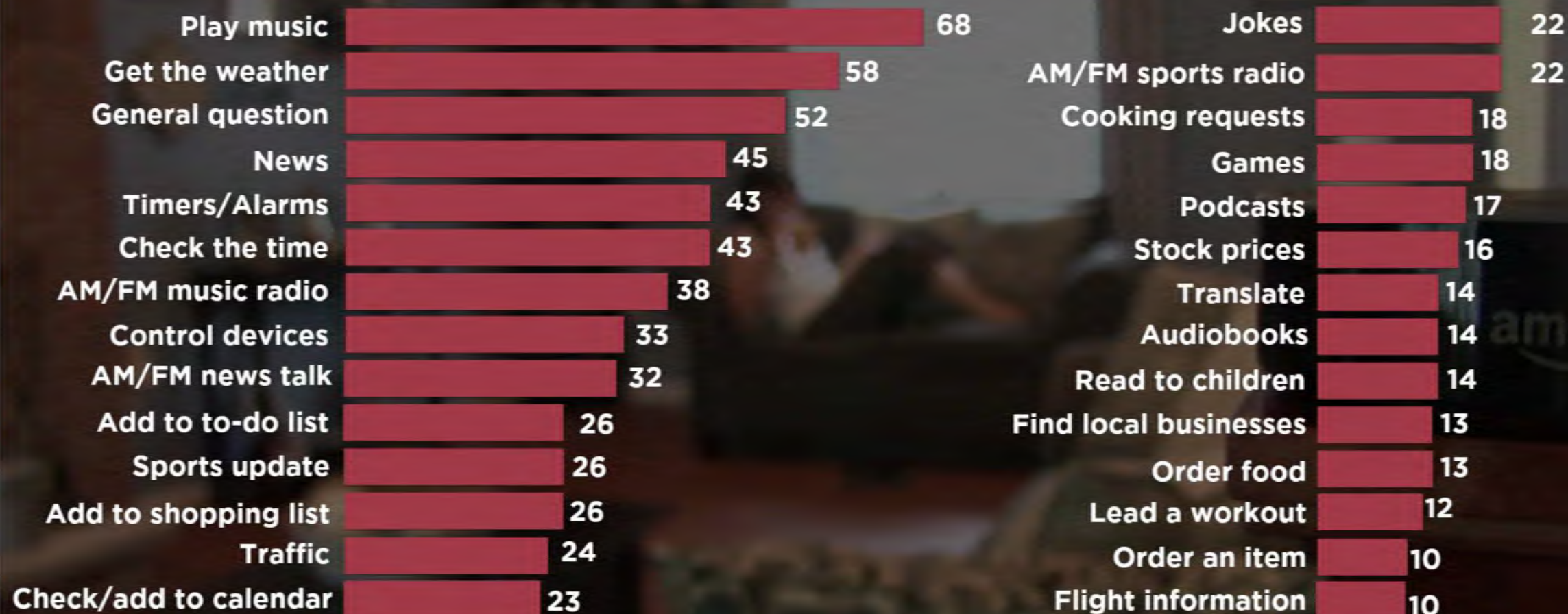
**65%**

"You wouldn't  
want to go back to  
life without your  
Smart Speaker"



# Smart Speaker Owners

## % Using Smart Speaker regularly for the following:





# Smart Speaker Owners

% Using Smart Speaker regularly for the following:

Using an average of

7.5

of these 28 task types regularly





# Listen to Podcasts:

Smart Speaker  
Owners:

70%

Non-Owners:

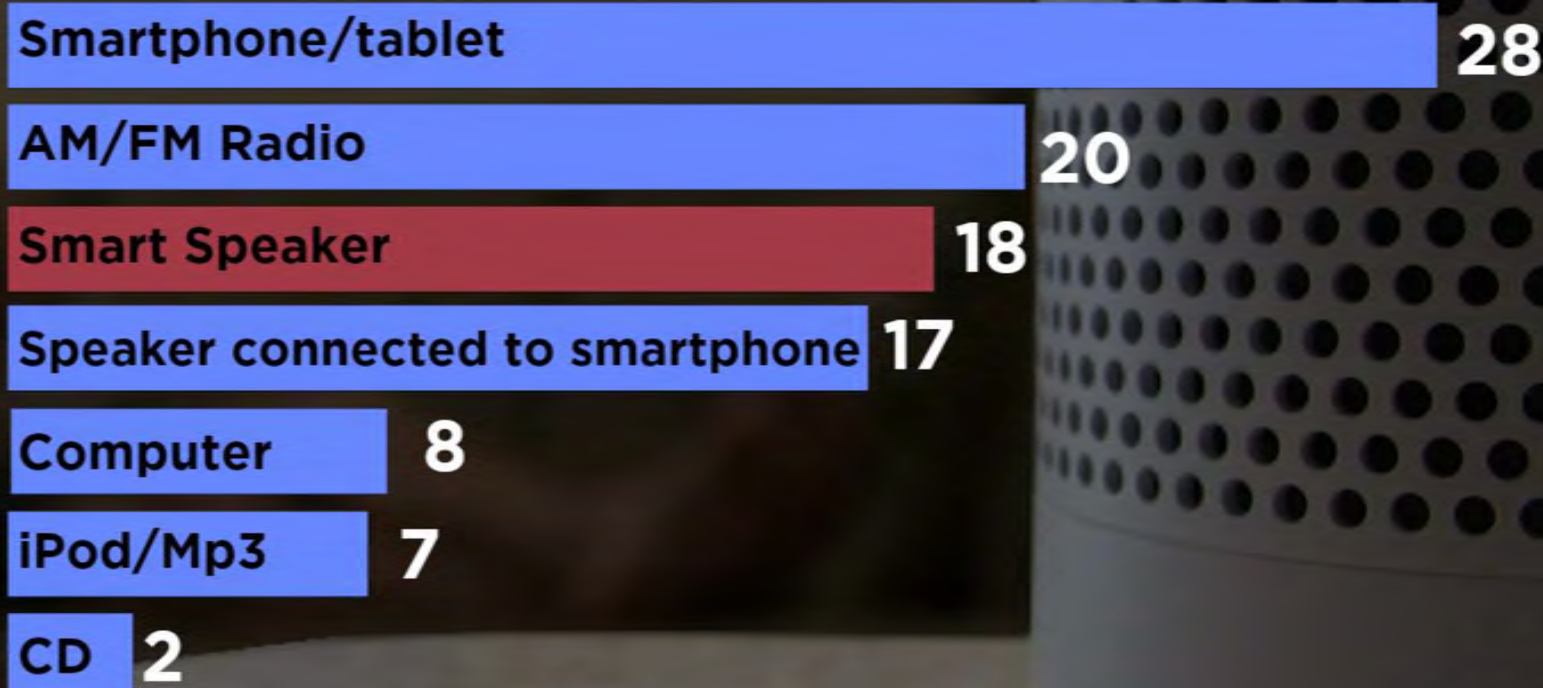
45%





# How do you listen to audio most often?

## Smart Speaker Owners





# Listen to Internet Streaming sources:

Smart Speaker  
Owners:

94%

Non-Owners:

71%





# Have a paid subscription to an Internet Audio service:

Smart Speaker  
Owners: **57%**

Non-Owners: **37%**





Smart Speaker Owners

**Strongly Agree/Agree:**

**28%**

How much do you agree/disagree...

"Getting your Smart Speaker led you to pay for a music service subscription"



How much do you agree/disagree...

Smart Speaker Owners

**Strongly Agree/Agree:**

70%

"You are listening  
to more audio  
since you got your  
Smart Speaker"





# Smart Speaker Owners

**65%**

listening to more

**Music**

since getting speaker

**28%**

listening to more

**News/Talk**

since getting speaker

**20%**

listening to more

**Podcasts**

since getting speaker

**18%**

listening to more

**Audiobooks**

since getting speaker





Those who listen to  
**Music**  
on a Smart Speaker

Median  
**4** hours **15** mins

of music listening  
on a Smart Speaker  
in the typical week

Those who listen to  
**News**  
on a Smart Speaker

Median  
**1** hour **15** mins

of news listening  
on a Smart Speaker  
in the typical week


Those who listen to  
**Podcasts**  
on a Smart Speaker

Median  
**1** hour **22** min

of podcast listening  
on a Smart Speaker  
in the typical week







# 29%

of Smart Speaker Owners

**use the "Flash/News  
briefing" feature on  
their Smart Speakers**



How much do you agree/disagree...

Smart Speaker Owners

**Strongly Agree/Agree:**

72%

"You don't know  
enough about  
your Smart  
Speaker to use  
all its features"





# % using Smart home capabilities:

## Smart Speaker Owners

Home lighting,  
thermostat, appliances **35%**

Home security **34%**

Outdoor lighting/  
equipment, sprinklers **20%**



# Have children in household:

**Smart Speaker  
Owners:**

**45%**

**Non-Owners:**

**32%**



# Smart Speaker Owners With Children in Household

57%

said entertaining children was a  
reason for wanting Smart Speaker



How much do you agree/disagree...

"The children in  
your household  
enjoy Alexa"



Smart Speaker Owners  
with children in household  
**Strongly Agree/Agree:**

88%





Smart Speaker Owners  
with children in household

**Strongly Agree/Agree:**

80%



How much do you agree/disagree...

"[Alexa/Google Home] has made it easier to entertain the children in the household"





How much do you agree/disagree...

Smart Speaker Owners  
**Strongly Agree/Agree:**

**61%**

"Having your Smart  
Speaker is like  
having someone  
to talk to"





How much do you agree/disagree...

Smart Speaker Owners  
**Strongly Agree/Agree:**

**69%**

"You have  
encouraged your  
friends to get a  
Smart Speaker"





# Reasons why you do not currently own a Smart Speaker:

Base: Non-owners who have expressed interest in owning a smart speaker

Smart speakers are too expensive

60

You don't know enough about the speakers yet

48

You are worried you wouldn't use it enough

41

You worry that hackers could use it to access your home or personal info

41

It bothers you that smart speakers are always listening

36

You are worried you would spend more money with one

35

You worry that it could allow the government to listen

34

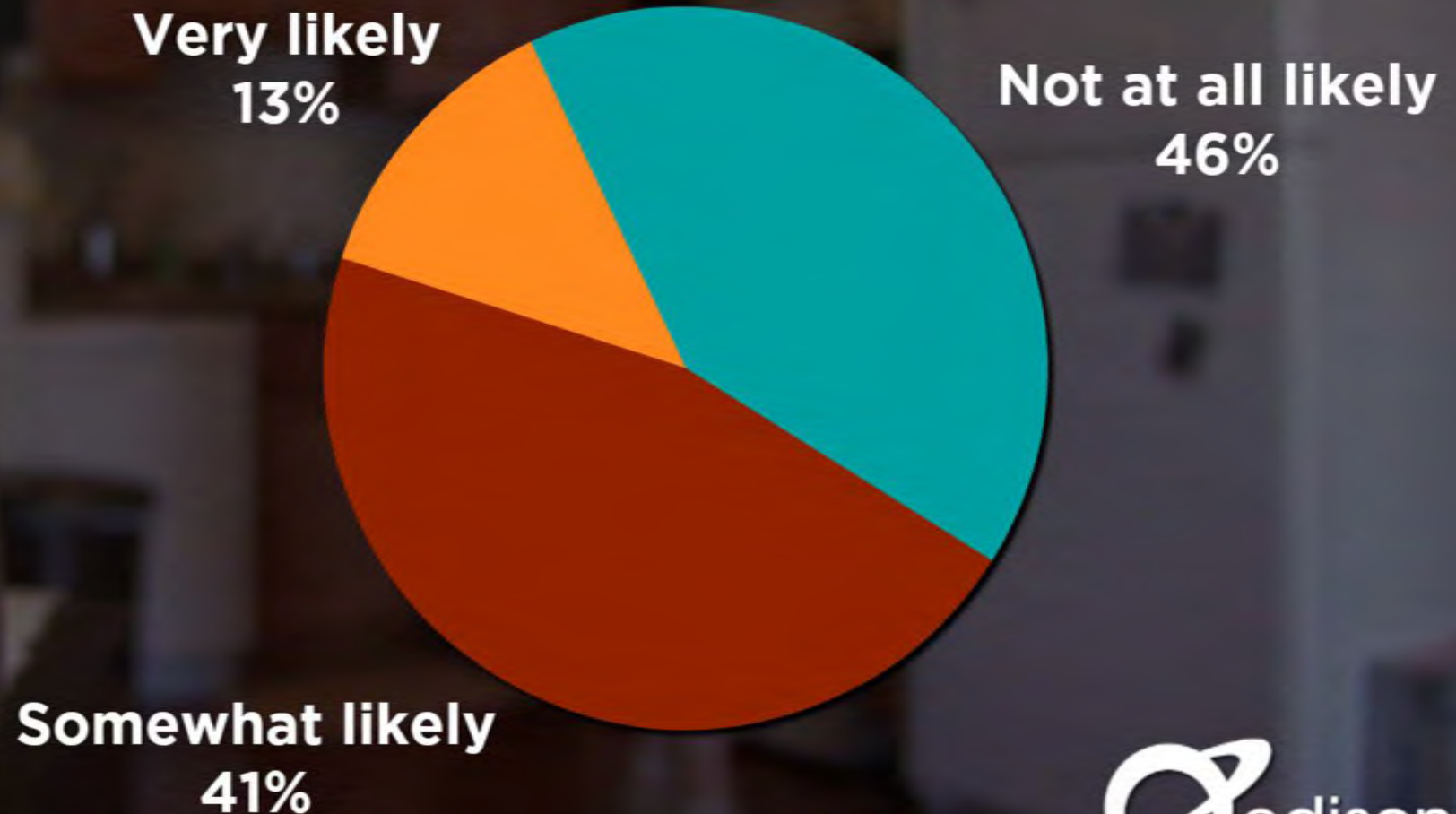
% saying reason





## Non-Owners

**How likely are you to purchase a Smart Speaker in the next six months?**





# Smart Speakers...

**...have quickly become  
essential to many owners**

**...encourage more audio listening**

**...make life easier, especially for parents**



# 40%

of Smart Speaker Owners

**say that their Smart  
Speakers have had an  
impact on their lives**





[www.nationalpublicmedia.com/smart-audio-report](http://www.nationalpublicmedia.com/smart-audio-report)

# The SMART AUDIO Report





